



LIMINA

5 UX Keys to Unlock Digital Transformation

07/13/2022

Introductions



Jon Fukuda

Co-Founder Limina.co

Human-Centered R&D + Ops Advocate

- 24+ years as a UX professional
- Passionate about amplifying the business value of research and design
- Focused on sustainable models for research and design integration
- Excited about digitally integrated workflows that support research and design integration

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Limina Application Office, LLC

UX & Technical Design Consultancy

UX | Technology | Business Ops and Delivery

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Introduction to Limina

LIMINA

We were founded in 2003 with the simple goal of designing highly intuitive, user-centered products.



Mission

Our mission is to **unleash human potential** at the nexus of information, technology, and people.



Goal

We partner with our clients to bring meaningful **innovation** through our unflagging pursuit of **excellence**. We craft solutions that **enhance** and **empower** through user-centered design.



Approach

Lean - Lean UX & Agile, flexible and adaptive to all development lifecycles.

Design - as a process, not as a role, encompassing business, UX, and technical design.



Qualifications

We are an award-winning and sought after thought-leader in design, development, and support of complex web and mobile applications, with 18 years of experience.

The Limina Experience

Our work is...

- **Relevant:** We are experts, focused on the **right issues** that are meaningful to both your business and to the end users
- **Extensible:** Our work provides a strong **foundation** for future needs
- **Measurable:** Our solutions provide a measurable **increase in user benefit** (ROI for design)
- **Transferable:** Strong design process-management and well documented, easy to use deliverables ensures a clean delivery and that solutions **continue to provide value** after our engagement
- **Dependable:** Our track record of **on-time** and **on-budget** delivery, and active risk management, complement your performance objectives

We promise...

- **Clarity:** Jargon-free communication, **transparent processes** that build understanding and bring peace of mind
- **Engagement:** We work as part of your team, you will know we are a **committed** partner
- **Empowerment:** We will work with you to remove barriers, build self-reliance and **transfer durable value**

- 
- 1. Digital Transformation & DesignOps**
 2. Foundations & Building Blocks
 3. Summary & Conclusion
 4. Q&A
 5. Resources
(included in post presentation PDF)

Why are we here?

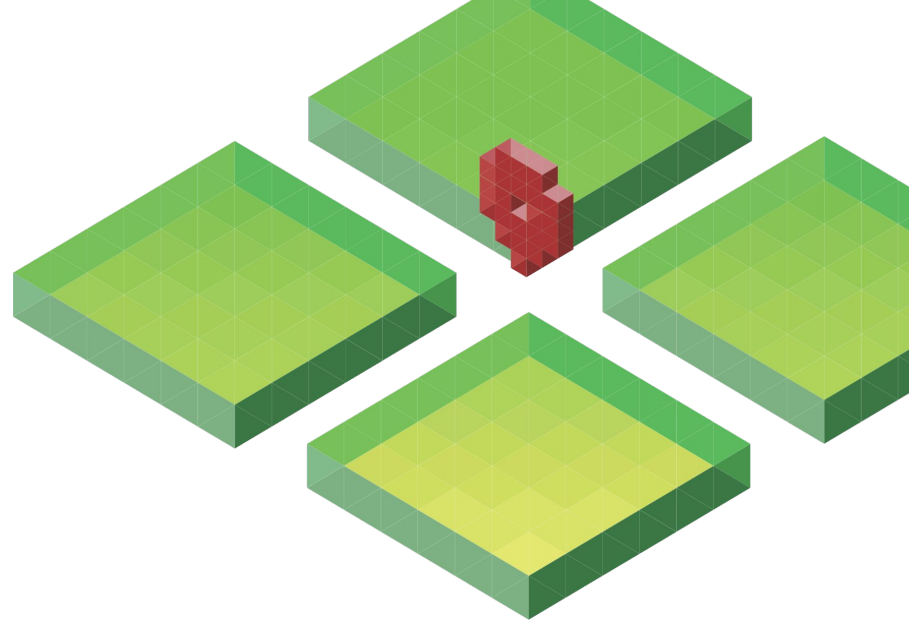
Why you're here:

Every company is either thinking about, planning or already involved in some level of digital transformation.

We're here because we know:

Developing scalable research and design - or your organizations capacity to sense and respond - is an important component of transformation.

Maturing your organization's approach to managing and delivering user experience work can contribute to faster and more sustainable transformation improving quality, efficiency, and customer satisfaction.



Defining Digital Transformation



Digital Transformation Defined (Org-Centric)

“The realignment of, or new investment in technology, business models, and processes to drive new value for customers and employees to effectively compete in an ever-changing digital economy.”

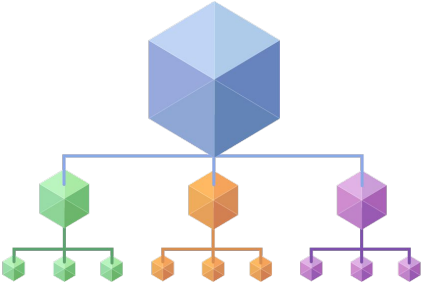
- Brian Solis

Digital transformation is an evolution of your business into the digital age. Incorporating technology into all areas of your business to leverage value for your customers.

Doing this successfully challenges us to:

- Rethinking old structures and processes and changing how you work, your mindset
- Become more agile, innovative, data-led, and open to learning and adapting

Digital transformations are hard. Most fail.



< 100 employees

2.7x

Higher success than
50,000 employees

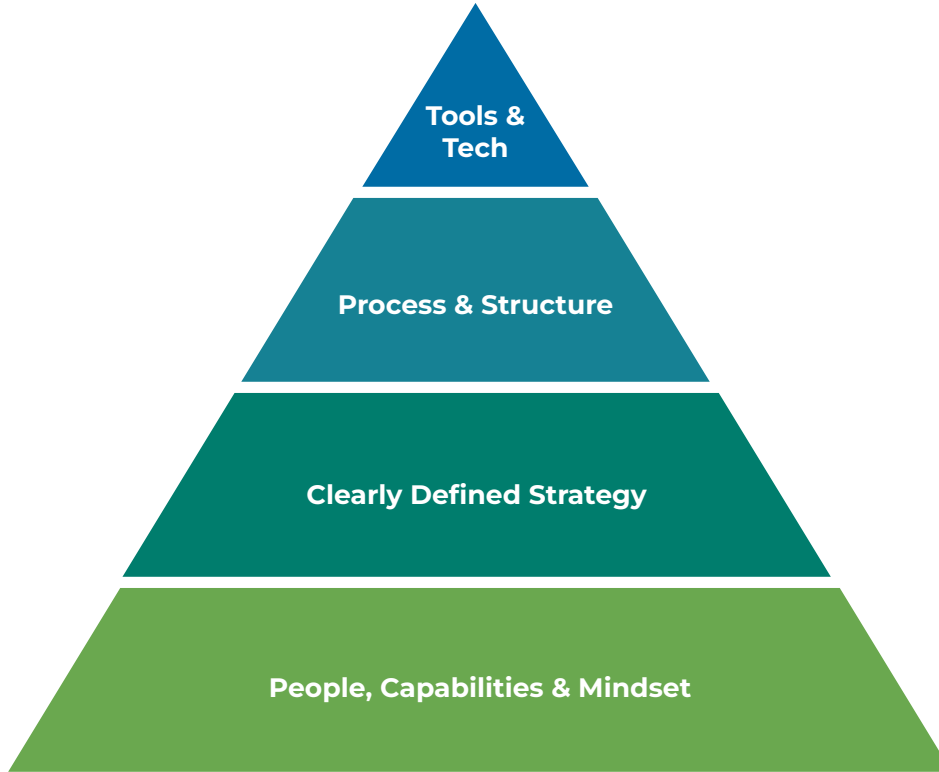


- 16% long term
- 7% short term

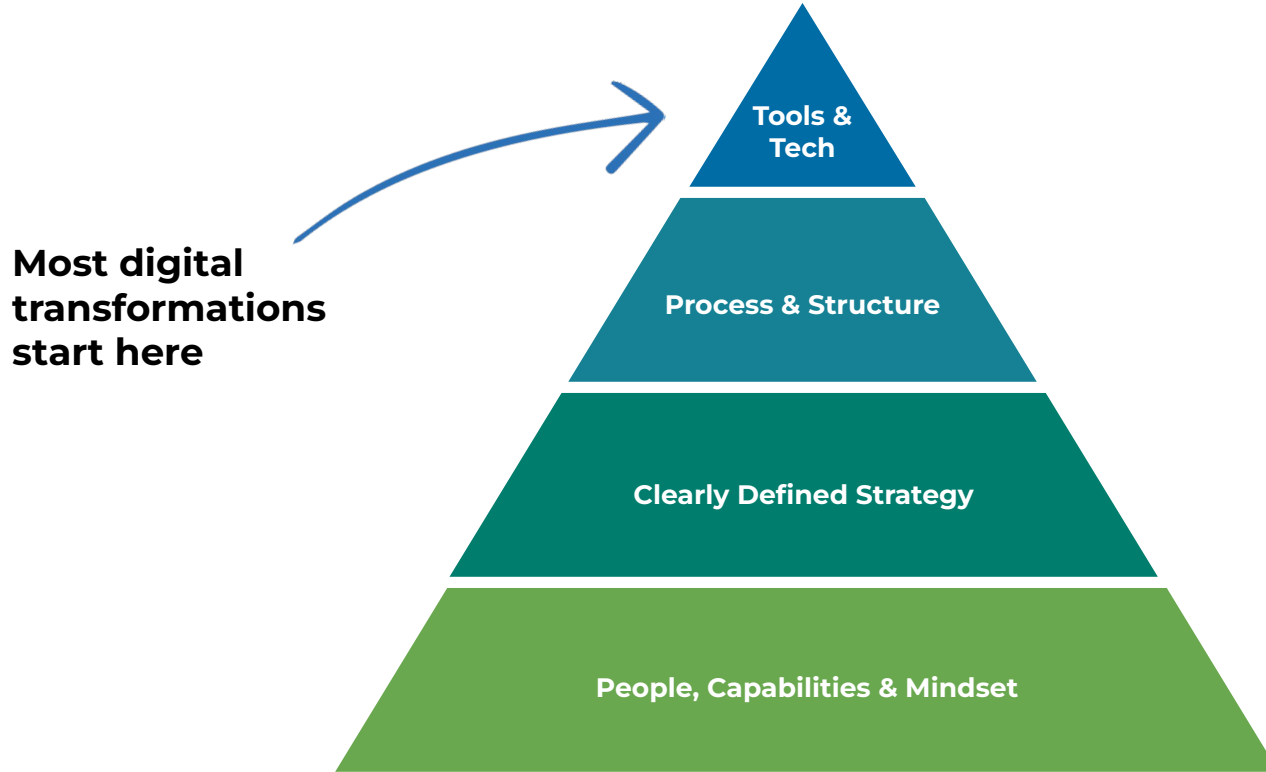


- \$900 B waste

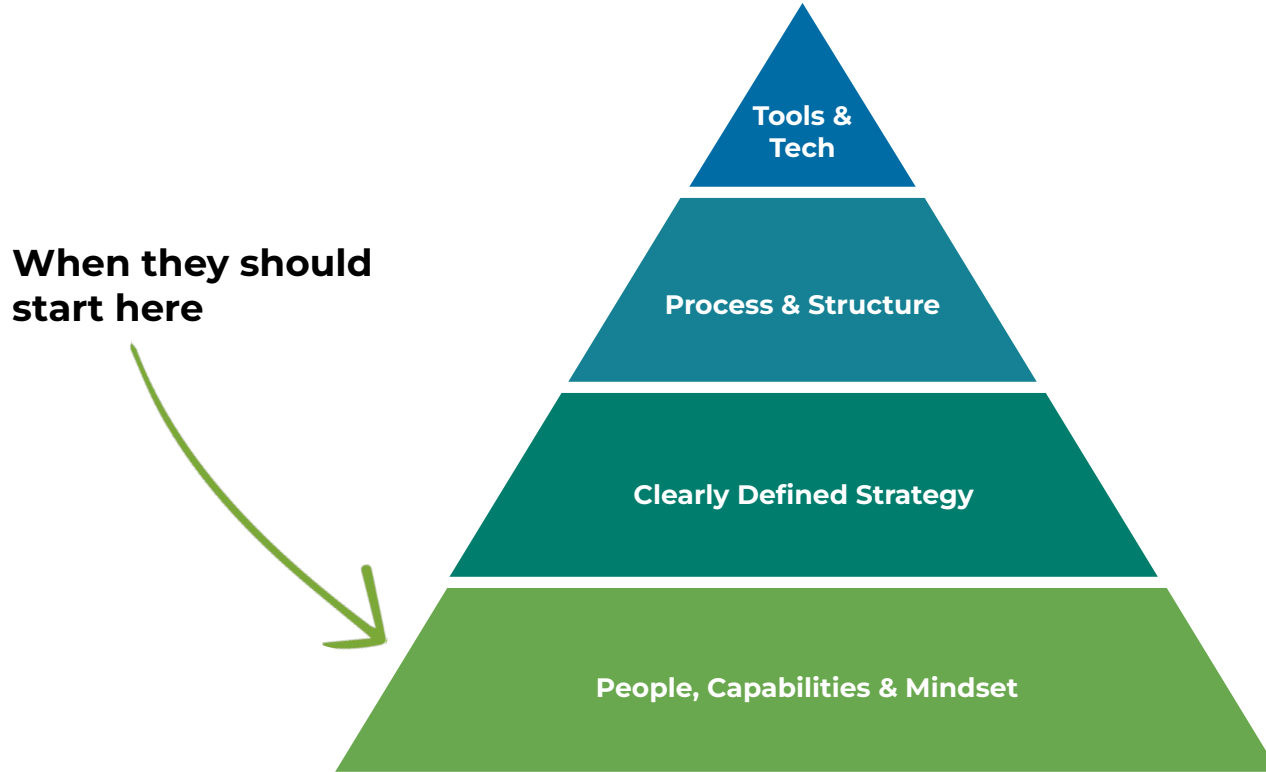
Transformation Pyramid



Transformation Pyramid



Transformation Pyramid



Digital transformations are hard. Most fail.

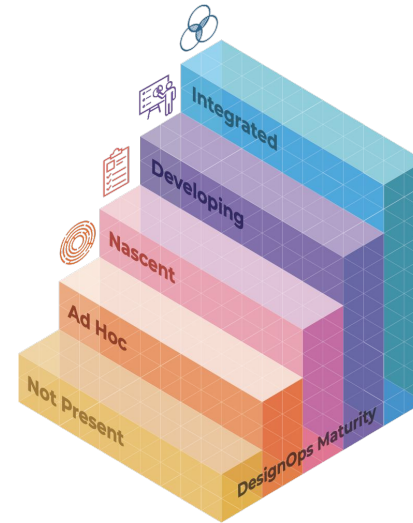
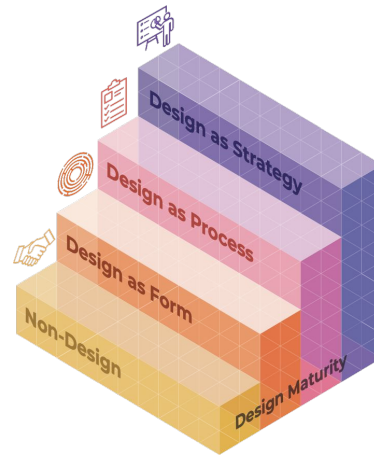
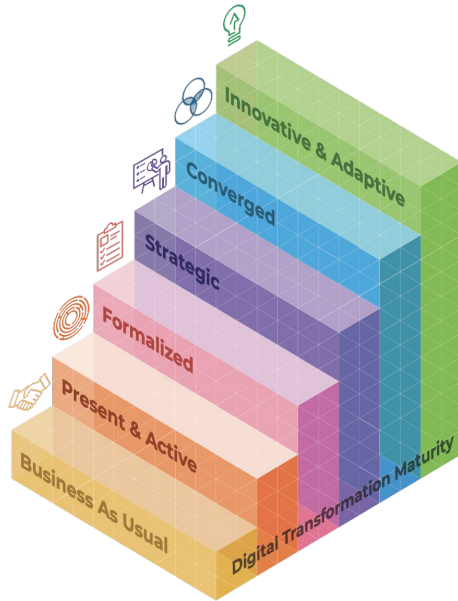
Digital tools and technology can provide opportunity for gains in efficiency and productivity...

...but unless most *people* have an *adaptive mindset* or *skills* to enable change through *continuous learning*, or if their existing processes are flawed, the transformation will fail.



**Where are you in your
transformation journey?**

Transformation by Maturity Model



Central Themes

- Collaboration
- Experimentation
- Digital Literacy
- Research
- Shared Insights
- Standardization
- Operationalization

Digital Transformation Maturity Model

BUSINESS as USUAL:

Organizations operate with a familiar legacy perspective of customers, processes, metrics, business models, and technology, believing that it remains the solution to digital relevance

PRESENT & ACTIVE:

Pockets of experimentation are driving digital literacy and creativity, albeit disparately, throughout the organization while aiming to improve and amplify specific touch-points and processes.

FORMALIZED:

Experimentation becomes intentional while executing at more promising and capable levels. Initiatives become bolder and, as a result, change agents seek executive support for new resources and technology.

STRATEGIC:

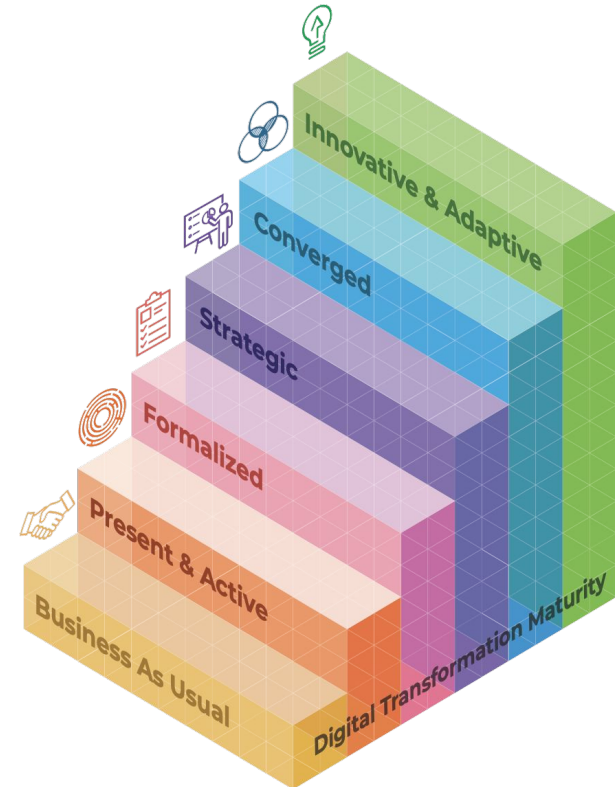
Individual groups recognize the strength in collaboration as their research, work, and shared insights contribute to new strategic roadmaps that plan for digital transformation ownership, efforts, and investments

CONVERGED:

A dedicated digital transformation team forms to guide strategy and operations based on business and customer-centric goals. The new infrastructure of the organization takes shape as roles, expertise, models, processes, and systems to support transformation are solidified

INNOVATIVE and ADAPTIVE:

Digital transformation becomes a way of business as executives and strategists recognize that change is constant. A new ecosystem is established to identify and act upon technology and market trends in pilot and, eventually, at scale



Design Maturity Model

NON-DESIGN:

Design is not applied systematically

DESIGN as FORM-GIVING:

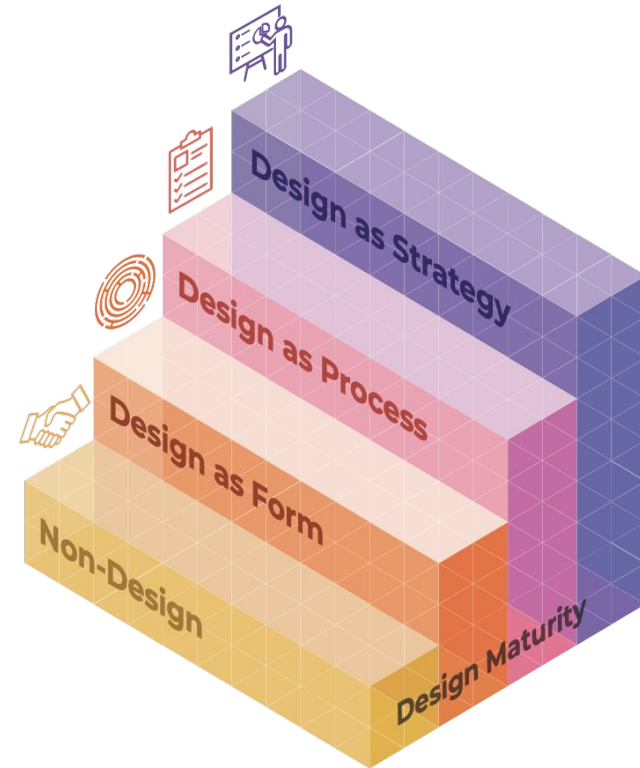
Design is used as a finish, form-giving or styling in new products/services

DESIGN as PROCESS:

Design is an integrated element in development processes

DESIGN as STRATEGY:

Design is a key strategic element in our business model



DesignOps Maturity Model

NOT PRESENT:

The role and value of DesignOps is rejected or dismissed. The company denies the need for standardized processes, methods or tools to support design work.

AD HOC:

The role and value of DesignOps is not well understood. Some people may be executing a few DesignOps activities, but these activities often happen by accident, not from strategic intent. They are ad hoc and undocumented.

NASCENT:

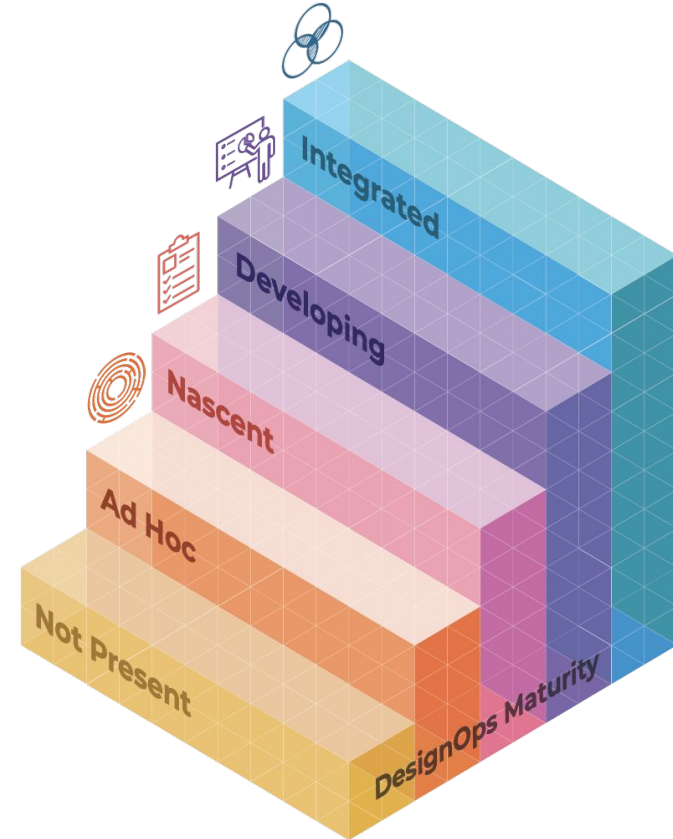
Some key players or individual teams understand the role and value of DesignOps. DesignOps activities are usually present in small groups or departments, not the entire company. There is little coordination across teams.

DEVELOPING:

There is broad understanding of the role and value of DesignOps. DesignOps activities are executed with strategic intent, and best practices are shared across teams or departments.

INTEGRATED:

The role and value of DesignOps is established and ingrained within the company culture. DesignOps activities are coordinated, automated and streamlined across all teams.





User Experience Lead Digital Transformation

Digital Transformation Defined (Human-Centric)

“Digital transformation is a human-led, tech-enabled, customer-centric process of continuous learning.”

- Growth Tribe

Human-centered (UX) capabilities are critical to enabling digital transformation

Success depends on the ability to:

1

Listen to customers to make sure that you are delivering the right thing at the right time - to build a practice and a culture ready to sense and respond

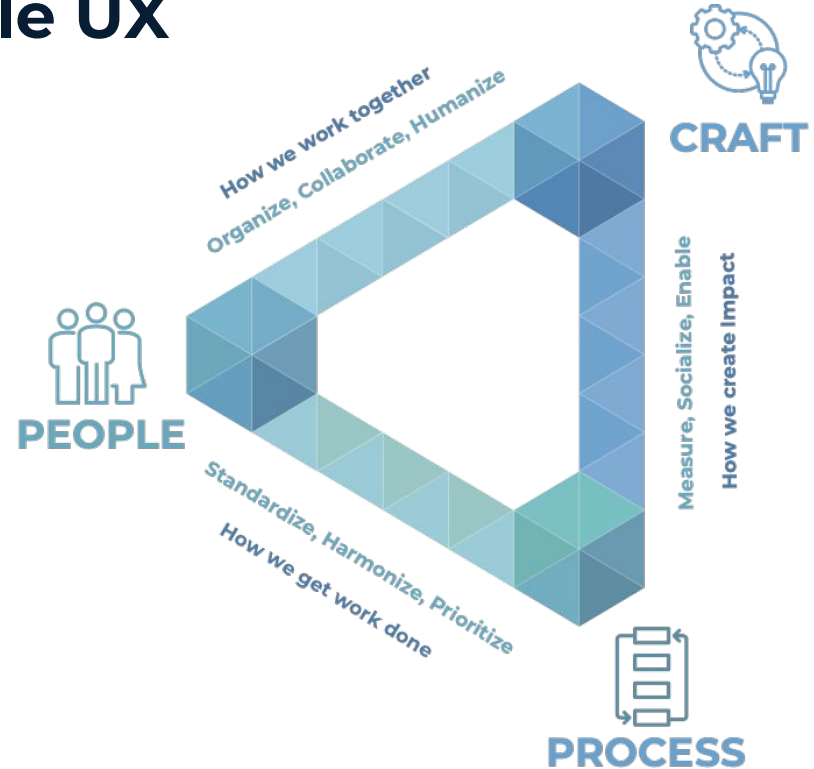
2

Enable the people in your organization to continuously learn and adapt as they listen to what customers want and need

Harnessing DesignOps to Scale UX

Standing up DesignOps at your organization will scale your research and design practice

- Operational support can be a force multiplier
- Stabilize research and design practices making them more resilient and sustainable:
 - User-centered processes
 - Adoption of research and design systems
 - Standardize skills, structure, delivery model, and career paths for research and design delivery



Laying a Foundation for Scalable DesignOps

Can you build a high functioning and valuable design practice without DesignOps management?

YES.

Even if your company isn't ready to start maturing an in-house research and design practice you can still:

- Get started laying the foundation for human-centered and design-led digital transformation
- Build a foundation for scaling a research and design practice



UX Lead Digital Transformation Building Blocks

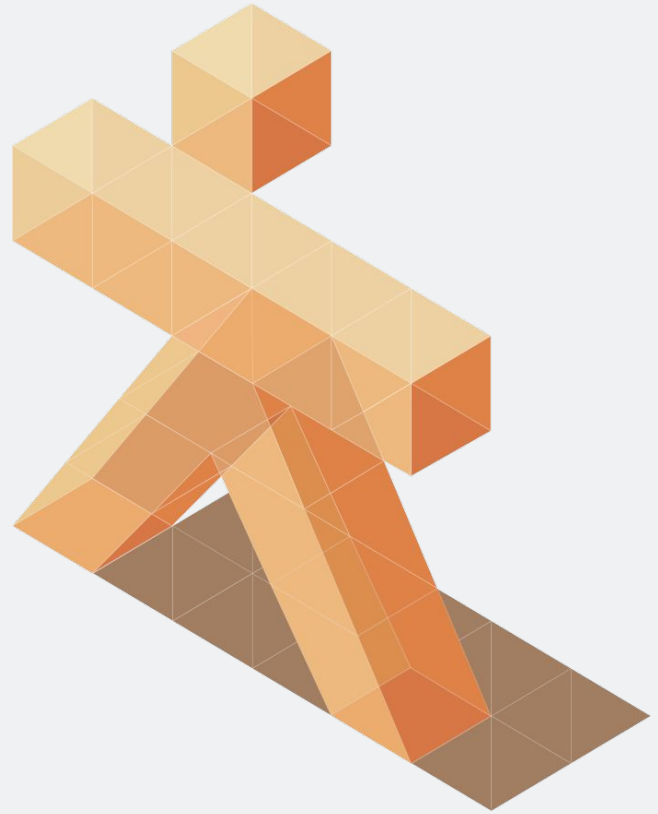


5 Building Blocks

- Be Human-Centric
- Adopt a Common Language
- Standardize UX Screeners
- Assemble Onboarding Kits
- Develop Shared Metrics



Be Human-Centric



Being Human-Centric

Human-centered design is:

- A Mindset
- An Approach
- A Skillset
- A Process
- Not Exclusive to “designers”

The goal of being Human-centered is:

- Connecting with:
 - Customers
 - Users
 - Employees
- Understanding:
 - Needs
 - Desires
 - Pain points

Empathy

Research & Insight

Strategic Planning

Design Planning

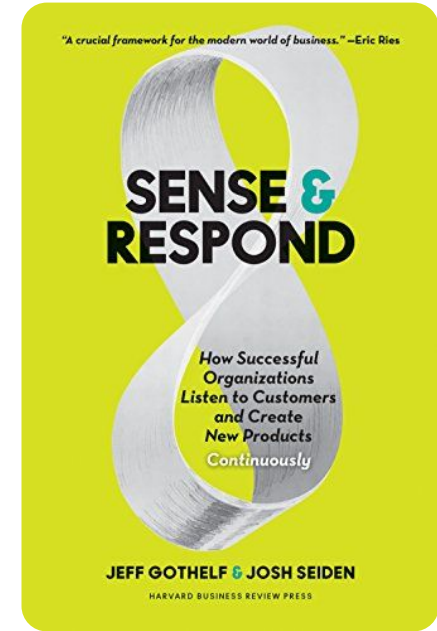
Experimentation

“It doesn't matter what product or service you provide you are in the software business.”

- Jeff Gothelf

In an ideal world, a digitally transformed organization has the following characteristics:

- Ability to Sense and Respond in a 2-way conversation with the market
- High-degree of cross-functional collaboration
- Embraces continuous change
- Adaptive and open culture of change
- Focus on Outcomes



Book Plug

Human-Centered Foundation: Quick-Tips

To jump-start your human-centered foundation, here a few quick tips:

1

Understand the User

- Conduct generative user research to better understand who your users
- Deepen your research insights about your users by segmenting them by any number of criteria:
 - Demographics
 - Behavior
 - Products/Services
 - Feature Affinity
 - Task/Role

2

Understand their Context

- Elaborate the day-in-a-life Journey Map of the user experience from learning about you and your product(s)/service(s) - through becoming a customer, and all the various touch points with your business in this journey.
- Where are they most successful, frustrated, happy or dissatisfied?
- Emergent patterns will signal what improvements you can add to your products and services to enhance their journey.

3

Build on-ramps & Off-ramps

Everyone operates in different ways. By building a practice of understanding your users and challenges that arise in their journey, you can create tailored learning experiences to aid in adopting and adapting to your digital transformation.

Plan for ways your customers lives will be affected by your new products, services, or features and craft on-boarding or learning modules to support they transition.

Adopt Common Language

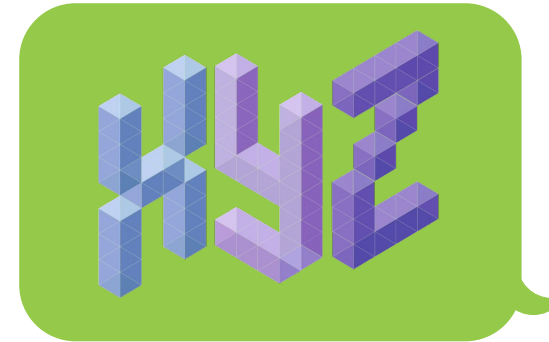
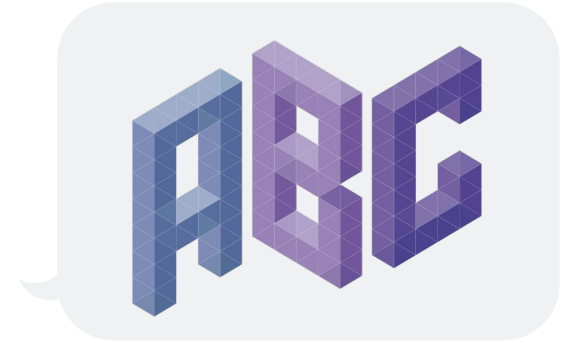


Campaign for Common Language

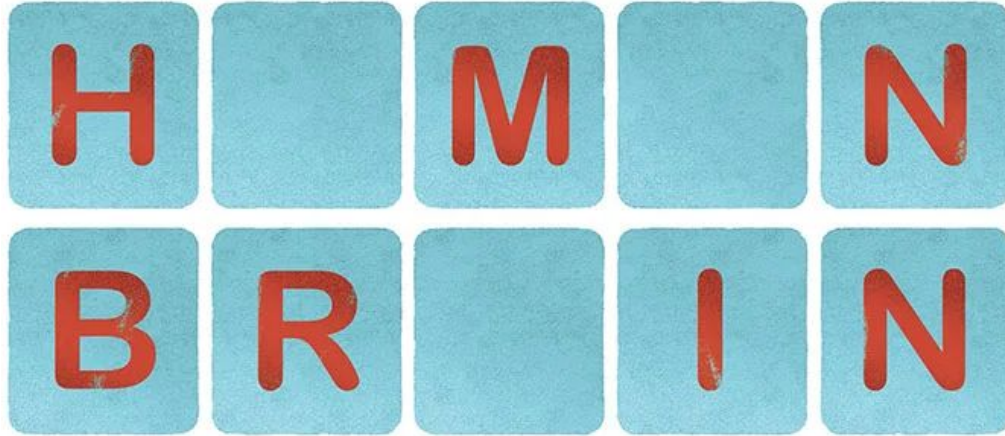
Miscommunication is all too common

especially when it comes to technical terminology in mixed disciplines

It's very typical, especially in larger organizations for parts of the organization to have their own set of common acronyms and terminology. It's also true, where parts of cross-functional teams are highly specialized and use the same terms as other parts of the organization, but with their own specific interpretations.



Campaign for Common Language



Our brains fill in the gaps.

Thank you hippocampus.

Our brains are fascinatingly creative and can pull from vast stores of information whether is memories or imagination.

The problem is, depending on where these gaps in communication and common understanding occur, we could get into trouble.

Campaign for Common Language



<https://www.youtube.com/watch?v=Ct-IOOUqmyY>

Even when it's
completely
obvious to you...

The peanut butter jelly recipe challenge.

Even when you think what you're talking about is or hearing from others might be crystal clear, there is still room for error.

This video demonstrates the need for clarity in language if we're to pass information to our asynchronous collaborators.

Campaign for Common Language



How the customer explained it



How the project lead understood it



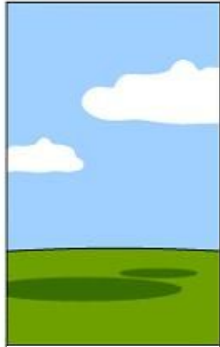
How the analyst designed it



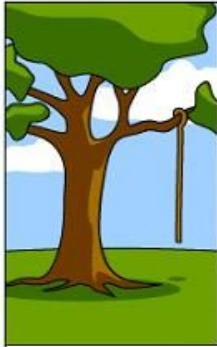
How the programmer wrote it



How the business consultant described it



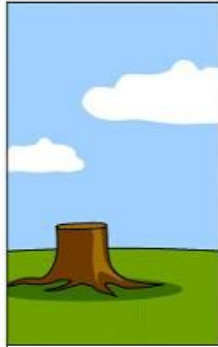
How the project was documented



What operations were installed



How the customer was billed



How it was supported



What the customer really wanted

This is still funny, because it true.

“Typical Project Life”

First posted on September 9th, 2003 depicting various perception gaps that often arise in software development projects through the simple task of building a tree swing.” - knowyourmeme.com

Said another way:

“...the exact same experience can mean two totally different things to two different people, given those people’s two different belief templates and two different ways of constructing meaning from experience.”

- David Foster Wallace, *This is Water*

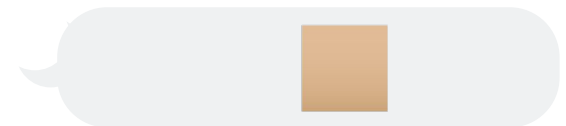
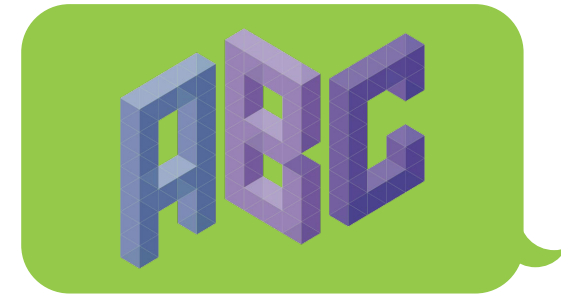
Campaign for Common Language - Approach

Build a shared repository of key terms that represent all aspects of the support cross-functional collaboration of the business at large:

- Systems
- Skills
- Users
- Tasks
- Objects
- Patterns
- Processes
- Etc.

By unifying concepts and language become you reduce misconception, miscommunication, and lost time.

Establishing a common language removes barriers and breaks down silos, transforming inter-company relationships and laying a cultural foundation for a more deeply integrated and highly collaborative business.



Campaign for Common Language - Quick Start

Here are some quick tips to aligning cross functional common language:

1

Establish common terminology and taxonomies to build shared language and understanding through:

- Identifying **problematic language** and vague terms prone to misinterpretation that can lead to miscommunication
- Identifying where miscommunication leads to **wasted time** or put **projects at risk**, and clarify any problematic language
- Developing a **shared glossary of terms**; introducing new processes and tools involves learning new vocabulary

2

Leverage a multidisciplinary task force or team responsible for establishing common language:

- **Elaborate on definitions** in the shared glossary of terms in your knowledge management system
- Identify **synonyms** and **alternate terms** used by different areas of the business
- **Note differences** between how teams, departments, systems, and customers refer to the same things

3

Run mini-marketing campaigns within the company that can build understanding and awareness.

Find ways to incorporate the terms into team and **project communications** - (if necessary, hyperlink to the glossary.)
Make it fun - especially if the terms are particularly problematic.

What's your company's peanut butter and jelly sandwich?

Scalable UX Screener



Scalable UX Screener

Organizations that do not have established research and design operations, generally have 3 paths:

- **Employees**
 - Restructuring and training
 - Hiring and building in-house research and design teams
- **Contract resources** individuals or agencies to gap-fill expertise
- **External vendors/partners** to execute research and design



These actions represent an influx of new practitioners into the organization. Ideally their contributions, while specific to their project context, can also:

1. Aid in establishing repeatable value-added processes, artifacts, and general best practices that complement existing product and service life cycles
2. Aid in executing against high-value projects for increasing the business value of research and design

Scalable UX Screener

Screener Goal

To ensure an infusion of skill, knowledge, and talent can be harnessed towards building research and design maturity

Objective

These screeners should set standards for assessing the capacity to establish research and design capabilities right-sized to support sustainable scale and maturity for your business



Scalable UX Screener - Examples

Here are some baseline screening criteria for your candidates and prospective UX resources:

- **Research Driven** - Skilled in specific types of research you need to be performed (e.g. navigation model testing, generative research, usability testing, etc.)
- **Human-centered methodology** - Understands the role and impact that cognitive psychology, perception, and context have on the product/service experience - has experience/expertise in establishing methods for research planning, recruiting, screening, moderating, and insight management
- **Process Orientation** - From requirements gathering and management through task workflow and interaction modeling, to iterative design review, and delivery
- **Design at Scale** - Experience/expertise in enabling design at scale, e.g. establishing/delivering atomic design libraries, design systems, repeatable/reusable design elaboration tools and methods - as opposed to one-off design files (jpegs photoshop documents)
- **Cross-functional Mindset** - Understands how they dovetail into cross-functional workflows and has established methods for meshing seamlessly into the broader organizational value stream



Scalable UX Screener - Quick Start

Here are some quick tips to jump start your screeners:

1

Identify research and design requirements from departments and teams:

- organization leadership
- product department
- customer services
- marketing and sales

2

Review the requirements list and rank from highest to lowest priority. Prioritize by:

- **High Impact** - what can move the needle furthest on the design maturity scale
- **Broad Scope** - how broadly their impact can deliver value across the org.

3

Decide on which 3-7 criteria that contributors:

- **must have** demonstrable expertise to bring to the table
- **-or-**
- that you would be willing to invest in having them develop if lacking

Assemble UX Onboarding Kits

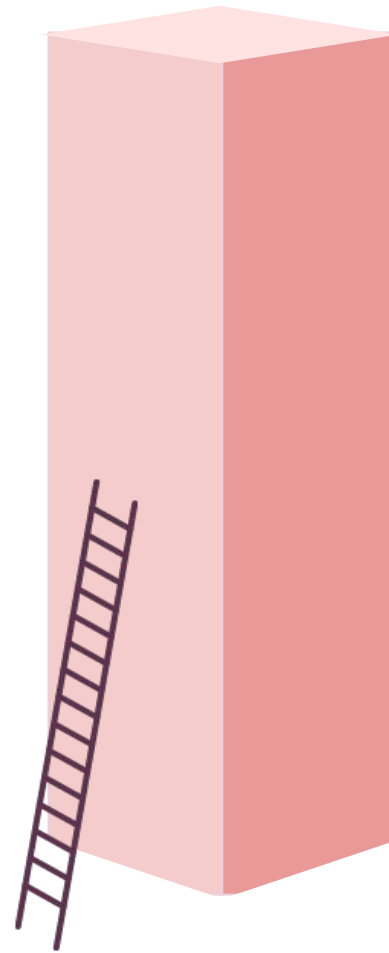


UX Onboarding kits

Vendors, suppliers and new hires often come to organizations prepared to ramp quickly on your company's “current-state of UX” they will have their own intake checklists for any number of the following:

- use cases
- personas
- journey maps
- system architecture(s)
- workflows
- business processes
- interaction models
- wireframes
- design documentation
- etc.

Standardizing onboarding kits can ensure that all your supporting teams are working from the same starting point. This saves time and budget by getting teams up and running faster through building shared understanding, setting expectations on outcomes, and providing quick access to resources.



Onboarding Kits - Examples

Prepare a guide for your new vendors, partners, or suppliers that will eliminate questions and confusion, while driving clarity and focus from the start. Items to consider including in your kit:

Company orientation:

- Org Charts
- Mission Statement
- Tools Overview
- Ecosystem Overview

Discovery Kit

Whether your team already has working models, processes, methods, and documentation management for user/customer discovery or not, this is a good opportunity to build some scaffolding for past, present, and future research. Depending on your team's existing resources, your kit may include:

- A curated list of discovery methods
- Facilitation/Moderator guides
- How-to videos
- Templates

Industry orientation(as needed)

- Acronyms cheatsheet
- Processes/Regulations overview
- Glossary of Terms

Design Kit

- Brand guidelines, style guides, accessibility requirements
- Design system(s) - or related files, documentation (workflows, wires, mocks, UI library)
- List of key contacts
- List of relevant project resources

Onboarding kit - Quick Start

Here are some quick tips to jump start your onboarding kits:

1

Identify stakeholders and collaborators who interactive with or have touchpoints and needs to be fulfilled by research and design service providers - one task force per kit

2

Collect and organize all information, documents, and items an external party would need to know in order to hit the ground running

3

Build and review these kits with collective inputs from all relevant stakeholders who need to engage and collaborate with these resources

4

Ensure that these kits are maintained for optimum impact and value for your vendors through reviews and retrospectives by internal and external audiences

Develop Shared Metrics



Shared Metrics - What story are your metrics telling?

At any given organization, various departments and teams set goals and measures to track their impact on various business objectives. Whether these metrics are tied together in the context of greater operational initiatives in the c-suite, this isn't always apparent to individual contributors.

Having shared metrics can help to:

- unify cross-functional teams and focus attention on monitoring the health of the business and successful product and service experiences and outcomes
- provides all contributors with a sense of their impact to the success of the organization
- sets a roadmap for a unified data strategy

Monitoring impact on performance can:

- help establish a shared vision for the future and give cause for collective celebration as milestones are achieved
- become a cultural touchstone for planning, organizing, and building a sense of shared destiny

Shared Metrics: Quick Tips

To jump-start your shared performance metrics, here a few quick tips:

1

Decide what to measure and how

- Decide what questions you want to answer with data. What would be the most compelling to key audiences?
- Work with key stakeholders to determine where there are gaps in their understanding
- Identify metrics already captured and/or reported
- Gauge the feasibility of capturing remaining desired metrics

2

Set Benchmarks

- If the metric is already captured, go back one period (based on the cadence) and set that as your benchmark
- If the metric is not already captured, take an initial measurement to serve as your benchmark

3

Report Regularly

- Determine how to report the metrics
- Ideally, leverage the centralized data repository and automate the report creation process
- Consider having a meeting to present the first iteration of each report and orient the recipients
- Report and distribute the metric on the agreed-upon cadence

Human-Centered Digital Transformation Building Block Summary



Human-Centered

Increase capacity to **continuously sense-&-respond to your customer and user needs** by integrating:

- User Research
- Insight Repositories
- Design Systems



Common Language

Advocate for **shared cross functional glossary** of terms to reduce costly miscommunication, increase alignment, and drive shared understanding.

- ID problematic language
- Build a glossary
- Integrate in team communication



Scalable UX Screeners

Build **common standards for all new hires, vendors, and partners** to ensure scalable human-centered digital transformation capability

- ID cross-functional requirements
- Prioritize
- Utilize
- Continually revise



Onboarding Kits

Reduce **friction and ramp-time** by helping your helpers get up to speed on all things you, your business, and your customers care about and need to be operational.

- Org On-boarding
- Industry Onboarding
- Discovery Onboarding
- Design Onboarding



Shared Metrics

Provide a culture of continuous performance management through implementing monitoring and celebrating **shared impact metrics**.

- ID metrics for teams and individual contributors to monitor the impact of their contributions
- Report on performance in team meetings
- Define experiments to improve objectives

Concluding thoughts

- Use any or all of these building blocks to help set a human-centered foundation for your digital transformation.
- Be open to taking alternate “bottom’s up” approaches to unlock your organizations specific challenges that block successful digital transformation.
- Share your success stories on taking a human-centered approach.
 - Standing up research and insight management practice
 - Supporting continuous learning for employees
 - Enabling design thinking for strategic business transformation



You got questions?

Q&A

We're here to answer.

Human-centered Digital Transformation Resources

Resources and references for today's webinar

- [Design Driven Innovation: Why it matters for competitiveness](#)
- [Human-Centric Digital Transformation Guide](#)
- [Whiteboard Session: Every business is a Software Business](#)
- [Human Centered Design in Digital Transformation](#)

Design Leadership contributed resources

[Unlocking success in digital transformations](#)

McKinsey states that to be successful, companies need a new way of running the organization that combines digital technologies and operations capabilities in an integrated, well-sequenced way to achieve step-change improvements in revenue, customer experience, and cost.

Resource submitted by [Peter Boesma](#), DesignOps Manager at Miro

[How to Empower Your Designers To Do Good Research](#)

Enhance the user experience by embedding research into your product design process.

Resource submission by:
[Cari Murray](#) Director, Marketing at Marvin
[Prayag Narula](#) CEO at Marvin